1990

REPORT ON TELEVISION

Nielsen

NIELSEN TELEVISION RESEARCH SERVICES

NTI-Nielsen Television Index

Daily and weekly estimates of TV viewing and national sponsored network program audiences including national daily ratings. Data reported: persons and household audiences by market sectons: Daily Ratings, Cost 1000 Estimates, Program and Brand Cumulative Audiences. The National Audience Demographics Report supplies estimates of audiences by persons categories within household demographics. On-line data systems provide a wide range of special analyses.

NSI-Nielsen Station Index

An over 200 local market measurement of television station audiences, providing season-to-season reports on viewing by time periods and programs. Data include: metro and Designated Market Area (DMA) ratings, station total audiences, program exemptions, cumulative audiences and estimates of viewing over a wide range of demographic categories.

Nielsen Metered Market Service

Provides daily and weekly reports on television audiences in New York, Los Angeles, Chicago, San Francisco-Oakland, Philadelphia, Detroit, Washington, D.C., Boston, Dallas-Fort Worth, Houston, Miami-Ft. Lauderdale, Denver, Atlanta, Seattle-Tacoma, Hartford & New Haven, Sacramento-Stockton, Minneapolis-St. Paul, Milwaukee, St. Louis, Indianapolis, Cincinnati, Phoenix, Tampa-St. Petersburg and Portland, OR.

NHI-Nielsen Homevideo Index

Furnishes a measurement service for cable television and related home video. Available data include audience measurements for the cable satellite networks, local cable systems, pay-TV services and program suppliers.

NSS-Nielsen Syndication Services

Provides one source for audience research on syndication, and offers new products for those in the program syndication business.

The Nielsen data in this booklet are estimates of the audiences and other characteristics of television usage as derived from Nielsen Television Index, Nielsen Station Index, Nielsen Syndication Service and Nielsen Homevideo Index measurements. The use of mathematical terms herein should not be regarded as a representation by Nielsen that such measurements are exact to precise mathematical values.

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1990 NIELSEN REPORT ON TV

As we enter the 90's, Nielsen begins its fifth decade of television audience measurement. During the first 40 years, there have been countless changes in the TV industry, as its place in American culture has been solidified. It could be argued that no other ten-year period brought as much change as the decade just completed. Nielsen has experienced many changes as well.

In 1980, Nielsen Station Index had only four local metered markets. Today, there are 24 with more on the way. When the 80's began, cable had limited availability and VCR's had yet to become a fixture in the nation's TV rooms. In anticipation of a changing marketplace, Nielsen Homevideo Index was established to meet the needs created by these new viewing options. By November '89, cable and VCR's were enjoying penetration rates of 57.1% and 66.9% respectively.

The mid-80's brought the debut of Nielsen Syndication Service and its ability to provide clients with one source for all existing syndication data. This service furnishes producers and syndicators with national and local ratings collected from the other three media divisions.

Throughout the 80's, Nielsen's national sample continued to grow to its current level of 4,000 households. Back in 1980, the sample stood at just over 1,200 and increased to 1,700 by 1983. With the introduction of the Nielsen People Meter in 1987, the sample was increased to 2,000. Both the People Meter and increased sample sizes have contributed greatly to increasing our ratings accuracy.

Like the 90's themselves, Nielsen will not be content to stand still. High definition TV, digital video recording, fiber optics and global program delivery promise to have an impact on the medium. The Nielsen Advanced Information Technology Center is continuously researching and testing new measurement and data gathering equipment to help meet audience measurement challenges head on.

As the leader in television audience research, we are dedicated to providing dependable, insightful information to our customers as well as the viewing public. "Nielsen Report on Television 1990," our 35th annual report on this electronic medium, represents this commitment. Containing highlights from recent reports and special studies, I believe you'll find it as interesting and informative as our previous editions.

John C. Holt

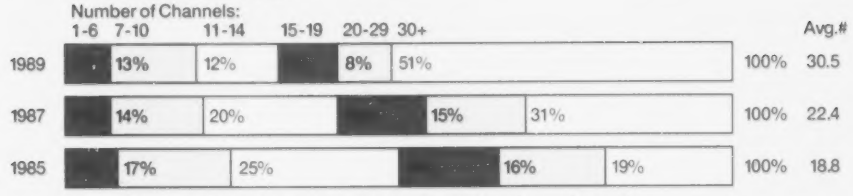
John C. Holt
Chairman and Chief Executive Officer,
A.C. Nielsen Company
Executive Vice President,
The Dun & Bradstreet Corporation

MANY CHANNEL CHOICES

Nielsen reports that the average U.S. TV household can receive 30.5 channels including those available through cable services. 68% of the nation can receive 15 or more channels; only 32% are limited to a choice of between 1 and 14 channels.

Channels Receivable Per TV Household

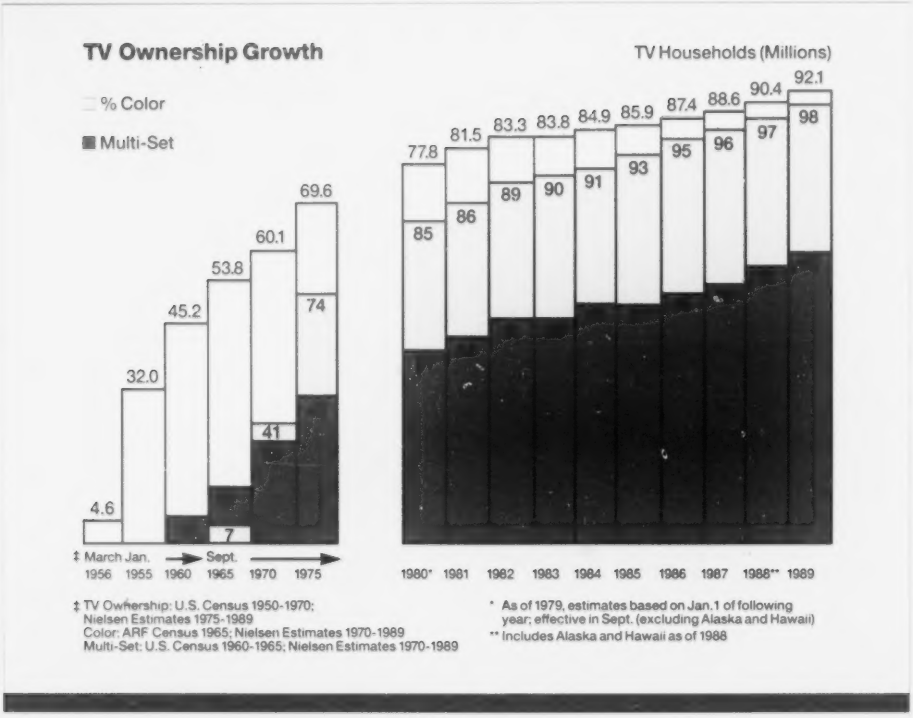
% Share of TV Households



Source: NTI Audimeter Sample: Sept. each year 1985-87; NTI People Meter Sample: Sept. 1989

MORE TV HOUSEHOLDS

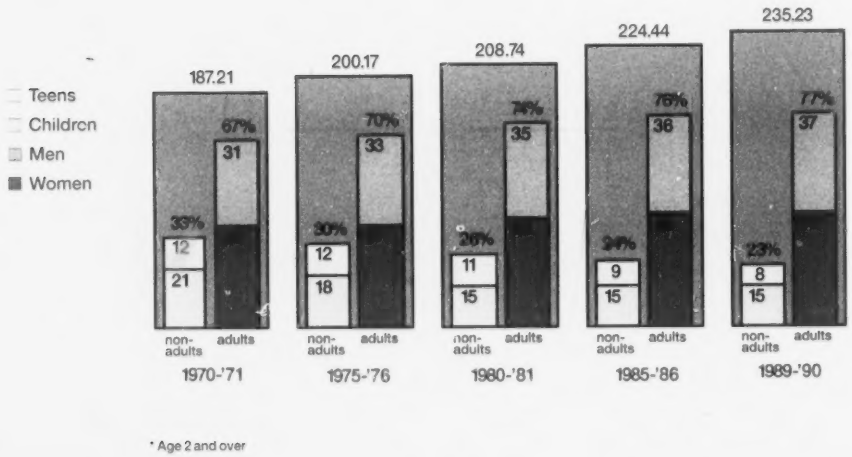
The number of U.S. TV households keeps increasing every year. Now at 92.1 million, this is more than double the figure for 1960. Of the reported 1989 TV households, 98% have color sets and 65% have more than one set.



MORE PEOPLE IN TV HOMES

Even though the total number of persons in TV households has increased, the proportion of non-adults versus adults continues to decline. According to 1989–'90 Nielsen estimates, of the 235.23 million in TV households, 77% are adults 18 years and older and 23% are ages 2 through 17.

Growth in Total Persons in TV Households (Millions)*

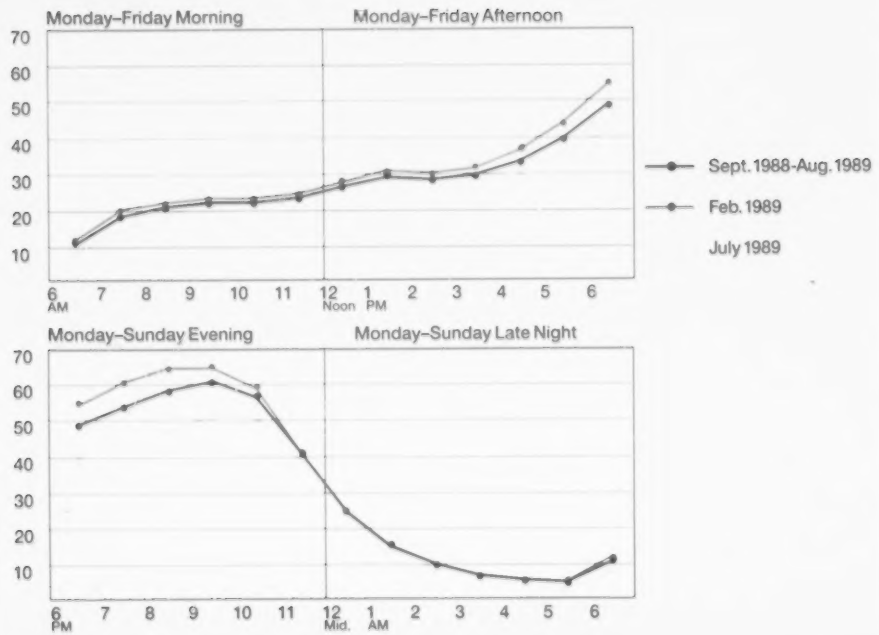


* Age 2 and over

TV USAGE PEAKS IN MID-EVENING

TV usage increases throughout the day, reaching a high between 8 and 10 pm. Midday and late night audience levels do not show much change from winter to summer. However, late afternoon and early evening audiences are lower in summer than in winter.

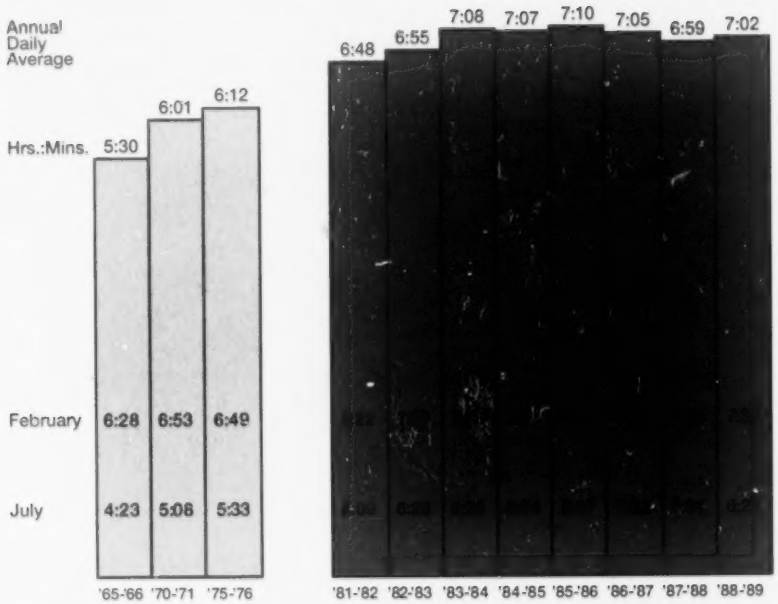
TV Usage Peaks in Mid-Evening



HOUSEHOLD TELEVISION USAGE OVER 7 HOURS PER DAY

The average number of hours of TV usage per household has not changed appreciably over recent TV seasons. For 1988-89 the figure was seven hours and two minutes. As expected, winter (February) levels are higher and summer (July) levels are lower than the average.

Average Hours of TV Usage Per Day



Nielsen estimates based on total U.S. Households Sept.-Aug. 48 week average excluding unusual days

VIEWING VARIES BY HOUSEHOLD CHARACTER-ISTICS

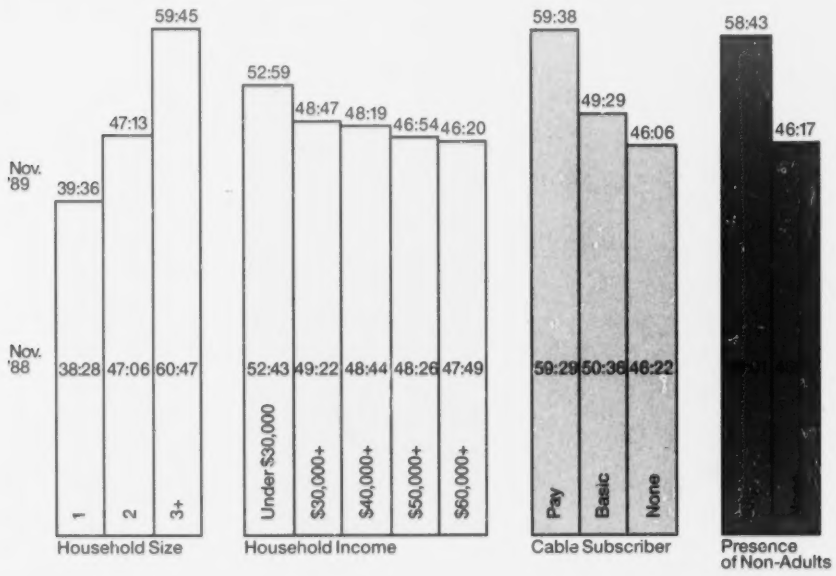
Households that view television the most are:

- Those with three or more people
- Those having pay cable
- Those with non-adults present

Household income has some affect on viewing levels; however, the most important determinants are household size, cable and whether non-adults are in the home.

Hours of TV Usage Per Week by Household Characteristics

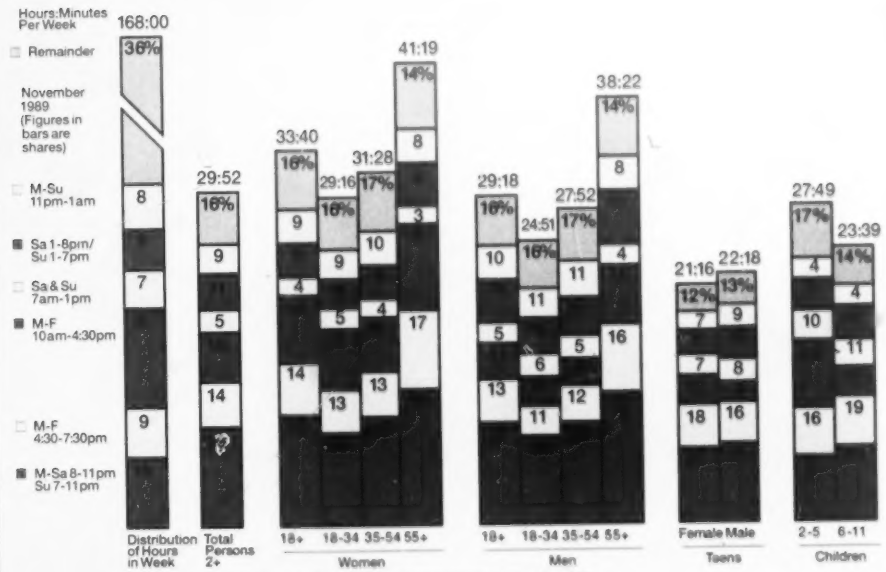
Monday–Sunday 24 Hour Total



WHO VIEWS TV

In general, women view more television than do men, younger children more than older children, and older adults more than younger adults. All but one of the demographic groups spend the greatest share of their time viewing TV during primetime. The one exception is younger children who spend slightly more time watching Monday–Friday daytime TV.

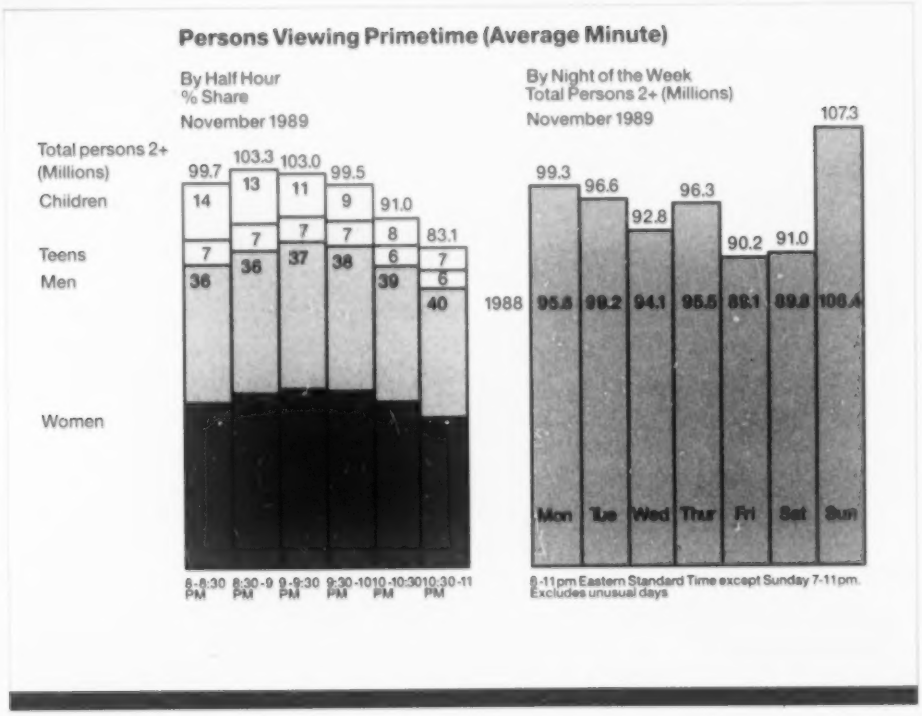
Weekly Viewing Activity for Women, Men, Teens and Children



Nielsen Estimates: National Audience Demographics Report–November 1989

MOST POPULAR VIEWING TIMES

The most viewed time period continues to be 8:30 to 9:00 pm. During this one-half hour and all other primetime hours, women account for the greatest number of viewers. Sunday evening, as in previous years, is the most popular night for TV viewing.

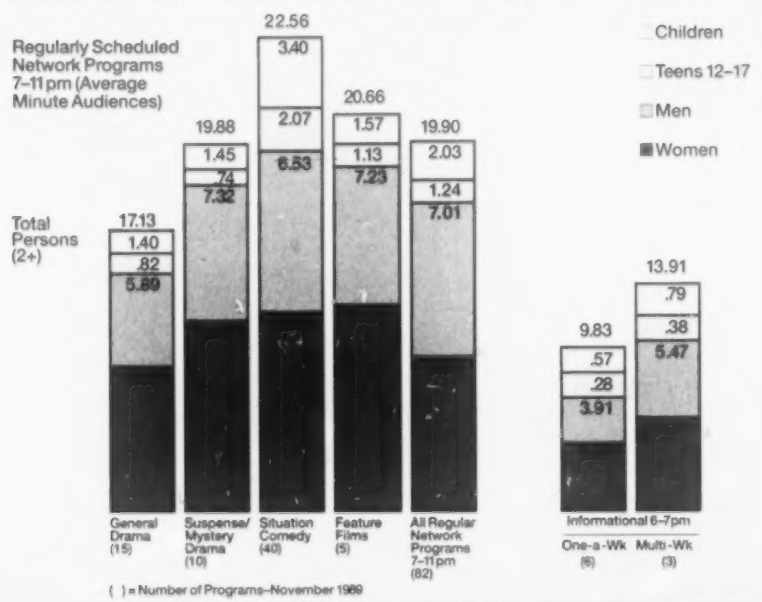


SITUATION COMEDIES LEAD AGAIN

Situation Comedies continue to attract the largest primetime audiences. Feature Films rank second and Suspense/Mystery third as the most watched program types.

Women make up the largest segment of the viewing audience in primetime as well as the informational (network news) hour.

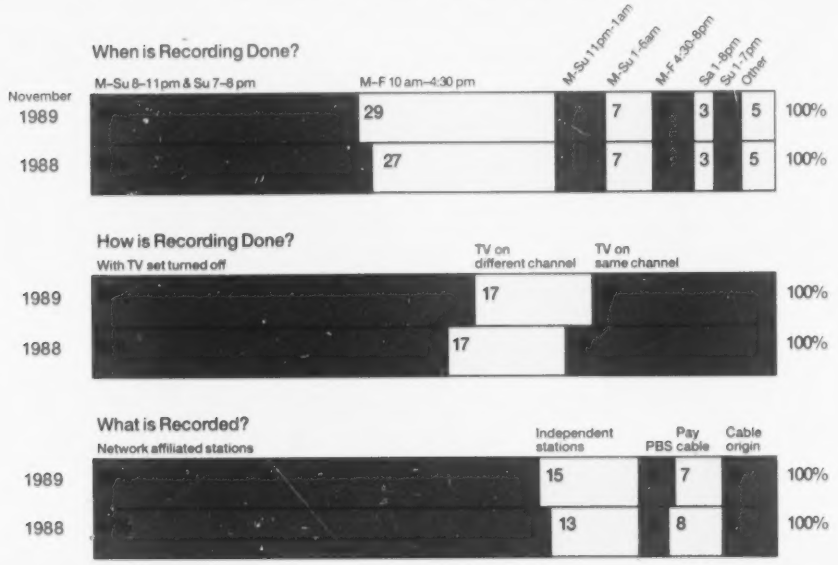
Audience Composition by Selected Program Type



VCR USAGE WIDESPREAD

Over two-thirds of the TV households in the U.S. now own video cassette recorders. Nielsen reports show most recordings are during primetime (39%) and daytime (29%). Over half of these recordings are made when the TV set is turned off. Programming on network affiliated stations account for almost two-thirds of the recorded material.

Videocassette Recorder Activity in VCR Homes

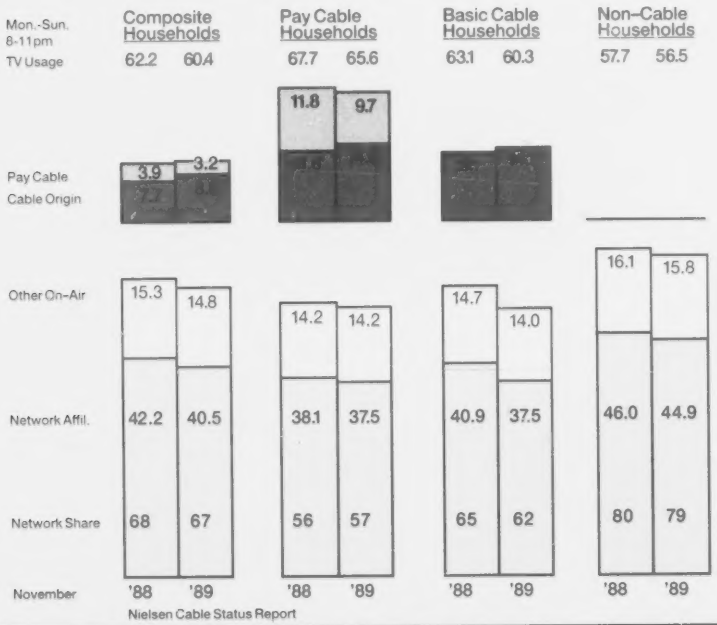


PAY CABLE TV HOUSEHOLDS DO MORE VIEWING

Subscribers to pay cable services as a whole view more television than do basic cable and non-cable households.

When looking at all households (composite) a 67% share of viewing in November 1989 was to network affiliates. However, in pay cable households the network share drops to 57%.

Source of Household Viewing (% Avg. Audience) Primetime



Nielsen Cable Status Report

A LOOK AT TV MINI-SERIES

Over the years mini-series have played an important role in network television programming. The table below lists the top twenty mini-series including *Rich Man, Poor Man*, the eight-episode drama that is credited with having originated the concept.

Top Network TV Mini-Series
September 1975—December 1989

Rank	Program	# of Telecasts	Avg. Audience %
1	Roots	8	44.9
2	Thorn Birds	4	41.9
3	Winds of War	7	38.6
4	Shogun	5	32.6
5	How the West Was Won	3	32.5
6	Holocaust	4	31.1
7	Roots, The Next Generation	7	30.2
8	Pearl	3	28.6
9	Rich Man, Poor Man	8	27.0
10	Master of the Game	3	26.7
10	79 Park Avenue	3	26.7
12	The Godfather	4	26.5
12	Masada	4	26.5
14	Scruples	3	26.3
15	Lonesome Dove	4	26.2
16	North & South	6	26.0
17	The Blue & The Gray	3	25.9
18	East of Eden	3	25.7
19	Roots (R)	5	25.5
20	V: The Final Battle	3	25.1

A mini-series is defined as a complete drama in a predetermined number of episodes (at least three) starting on or after 6:00 pm and before 11:00 pm NYT on ABC, CBS or NBC.

THE TOP 20 SYNDICATED PROGRAMS

Hundreds of television programs are distributed each year by way of syndication. Many are sold directly by syndicators or distributors to stations on a straight "cash" basis. Others are distributed on a barter basis with stations accepting programs in return for running commercials sold by the national distributor. Still others are telecast on a "cash plus barter" basis.

During 1989, the Nielsen Syndication Service provided audience estimates for over 450 barter syndicated programs, both regularly scheduled series and specials, in its weekly pocketpiece reports. "Unwired Networks" were also measured by NSS.

For the Fourth Quarter 1989 (9/18--12/31) the following twenty programs were the top-rated barter syndicated programs included in our weekly Nielsen Syndication Service reports. This listing is confined to syndicated programs only. Special analyses of "Unwired Networks" are not included in this ranking.

Top Twenty Barter Syndicated Programs (*) 1989–1990 Season (9/18/89–12/31/89)

Rank	Program	Avg. Audience %	# of Stations	% U.S. Coverage
1	Wheel of Fortune (M-F)	14.0	228	98
2	Jeopardy	12.4	214	97
3	Oprah Winfrey Show	9.7	211	98
3	Star Trek	9.7‡	232	97
5	Cosby Show – Syndicated	9.6‡	202	97
6	Universal Pictures Debut Net	9.1‡	131	94
7	Current Affair	8.6‡	183	95
8	Wheel of Fortune (Weekend)	8.4	195	90
9	Entertainment Tonight	8.1‡	163	95
10	Tri Star Showcase	7.1‡	121	90
11	Donahue	6.6	221	98
12	National Geographic On Assignment	6.2‡	139	92
13	Geraldo	5.9‡	194	98
13	TV Net Movie	5.9‡	173	94
15	MGM Premiere Network III	5.6‡	167	96
16	Star Search	5.5‡	150	94
17	Orion Galaxy Network	5.4‡	135	89
18	Mama's Family – Syndicated	5.3‡	169	89
19	Family Feud – Syndicated	5.2	123	84
20	People's Court	5.1‡	170	90

*Excludes Multi-Segment Programs rated under one "Umbrella Title." "Umbrella Programs" which would have been included are "World Wrestling Federation" (8.9 AA%), "Wrestling Network" (7.2 AA%) and "National Geographic On Assignment" (6.2 AA%).

‡Includes Multiple Telecasts

Source: Nielsen Syndication Service National Television Ratings

THE TOP 15 NETWORK PROGRAMS

Many different programs rank in network television's top 15 during the TV season. The breakdowns shown here are from Nielsen's National TV Ratings for November 1989.

Audience size is only one of the many ways to assess a program's worth or success. Shows that are not included in these rankings can also be successful because they deliver very desirable audience demographics for certain advertisers.

Top 15 Regularly Scheduled Network Programs

Total U.S. TV Households	AA%
1. Bill Cosby Show	23.6
1. Roseanne	23.6
3. Cheers	22.3
4. A Different World	22.1
5. Golden Girls	21.2
6. 60 Minutes	20.9
7. Empty Nest	20.2
8. Murder, She Wrote	19.6
9. Wonder Years	19.4
10. Dear John	19.2
11. L.A. Law	18.9
12. Who's The Boss?	18.4
12. NFL Monday Night Football	18.4
14. Unsolved Mysteries	18.1
15. Coach	17.8

Women 18+	AA%
1. Roseanne	18.3
2. Bill Cosby Show	18.2
3. Golden Girls	17.9
4. Empty Nest	17.2
5. Murder, She Wrote	17.1
6. Cheers	17.0
7. A Different World	16.8
8. 60 Minutes	15.5
9. Dear John	15.0
10. L.A. Law	14.7
11. Unsolved Mysteries	14.2
11. Coach	14.2
13. Matlock	13.7
13. In the Heat of the Night	13.7
13. Wonder Years	13.7

Men 18+	AA%
1. NFL Monday Night Football	17.2
2. 60 Minutes	15.3
3. Cheers	13.9
3. CBS NFL Football Game 1	13.9
5. Roseanne	13.2
6. Bill Cosby Show	12.4
7. L.A. Law	12.1
8. Murder, She Wrote	11.9
8. Unsolved Mysteries	11.9
10. CBS NFL Football Game 2	11.7
11. NFL Game 2	11.5
12. Dear John	11.4
12. A Different World	11.4
14. In the Heat of the Night	11.3
15. CBS NFL Football Post	10.9

Teens 12-17	AA%
1. A Different World	20.3
2. Bill Cosby Show	19.4
3. Wonder Years	17.7
4. Roseanne	17.5
5. Who's The Boss?	15.8
6. Doogie Howser, M.D.	14.6
6. Cheers	14.6
8. Coach	14.1
9. Head of the Class	13.4
10. Hogan Family	13.2
11. Growing Pains	13.1
12. Full House	12.2
13. Alf	12.0
14. Golden Girls	10.7
15. Dear John	10.6

Children 2-11	AA%
1. Bill Cosby Show	19.0
2. A Different World	18.3
3. Full House	15.8
4. Roseanne	14.7
5. Wonder Years	14.5
6. Hogan Family	14.4
7. Family Matters	14.2
8. Alf	13.7
9. Who's the Boss?	12.9
10. Perfect Strangers	12.6
11. Slimer! & Real Ghosts II	12.5
12. Magical World of Disney	12.2
13. Golden Girls	11.4
14. Slimer! & Real Ghosts I	10.9
14. Just the Ten of Us	10.9

Nielsen Average Audience Estimates
2 or more telecasts (5 min. or longer)
November 1989

THE TOP 10 PROGRAMS, BY LOCAL MARKETS

Each of the top 10 nationally ranked primetime network programs for November 1989 appears in at least nine of the markets where Nielsen has metered measurements of local TV audiences. However, each market has its own top ten ranking that includes one or more network programs not on the national list.

	Smurfs Surprises Pt. 2 (ABC)	Roseanne (ABC)	Bill Cosby Show (NBC)	Cheers (NBC)	A Different World (NBC)	Golden Girls (NBC)	60 Minutes (CBS)
U.S.*	1 25.2	2 [illegible]	3 23.7	4 [illegible]	5 22.1	6 21.2	7 20.9
New York	3 25.0	2 [illegible]	5 23.6	1 [illegible]	8 21.2	6 [illegible]	
Los Angeles	1 25.1	2 [illegible]	3 22.4	4 [illegible]	8 19.3	7 [illegible]	10 18.8
Chicago	2 27.5	1 [illegible]	7 23.1	6 [illegible]	9 22.4		10 22.3
Philadelphia	2 27.3	1 [illegible]	4 25.2	3 [illegible]	9 22.7		7 23.6
San Francisco–Oakland–San Jose	8 19.8	1 [illegible]	7 20.4	2 [illegible]		5 [illegible]	4 22.3
Boston	2 25.6	6 [illegible]	7 21.8	1 [illegible]		9 [illegible]	3 24.3
Washington, D.C.	3 23.5	4 [illegible]	1 24.4	5 [illegible]	5 21.9	8 [illegible]	2 23.9
Detroit	3 26.9	7 [illegible]	2 28.7	1 [illegible]	5 26.1	9 [illegible]	
Dallas–Fort Worth	2 25.9	1 [illegible]	4 23.1	7 [illegible]	6 22.0		9 21.2
Houston	1 36.7	2 [illegible]	4 27.2	8 [illegible]	7 26.2		
Atlanta	3 25.4	2 [illegible]	1 25.9	5 [illegible]	4 23.7	9 [illegible]	6 22.7
Tampa–St. Petersburg		10 [illegible]	3 25.9	6 [illegible]	8 20.4	4 [illegible]	1 27.6
Minneapolis–St. Paul	2 26.6	1 [illegible]	5 23.1	4 [illegible]			9 20.8
Seattle–Tacoma	1 28.6	1 [illegible]	6 22.6	3 [illegible]	10 20.4		8 21.3
Miami–Ft. Lauderdale	2 18.4	1 [illegible]	6 17.1	4 [illegible]		3 [illegible]	
St. Louis	4 26.7	6 [illegible]	1 27.9	5 [illegible]	8 25.0	1 [illegible]	10 24.5
Denver	3 27.7	2 [illegible]	6 21.5	4 [illegible]			
Phoenix	1 27.3	2 [illegible]	4 22.1	6 [illegible]		8 [illegible]	
Sacramento–Stockton–Modesto	5 22.7	4 [illegible]	2 24.1	1 [illegible]	9 21.5	10 [illegible]	6 22.5
Hartford–New Haven	10 20.3	3 [illegible]		6 [illegible]			1 25.6
Indianapolis	5 23.7	2 [illegible]	1 28.0	3 [illegible]	4 23.8		7 20.2
Milwaukee	6 23.1	1 [illegible]	4 24.3	2 [illegible]			3 24.8
Cincinnati	1 34.5	3 [illegible]	4 25.4	2 [illegible]	5 24.6	10 [illegible]	8 21.7

*Nielsen Television Index Average Audience ratings for matching Nielsen Station Index dates of November 2–29, 1989.

Empty Nest (NBC)	Wonder Years (ABC)	Murder, She Wrote (CBS)	LA Law (NBC)	Who's The Boss (ABC)	Dear John (NBC)	America's Funniest Home Videos (ABC)	Unsolved Mysteries (NBC)	NBC Movie of the Week–Friday (NBC)	Monday Night Football (ABC)	Growing Pains (ABC)	In the Heat of the Night (NBC)	Matlock (NBC)	CBS Movie Special–Monday (CBS)	Coach (ABC)	Designing Women (CBS)	60 Years of Television (CBS)	Murphy Brown (CBS)	Married With Children (FOX)	
8 20.3	9 19.9	**10** 19.6																	U.S.*
7 21.3			4 23.7	**9** 21.0	9 21.0														New York
9 19.3	5 21.0																	**6** 20.4	Los Angeles
	4 24.3	**8** 22.5	3 25.2	**5** 24.0															Chicago
	5 24.7	**10** 22.2		**6** 24.6	8 22.9														Philadelphia
10 19.4	6 20.7	**3** 22.8	10 19.4	**9** 19.7															San Francisco–Oakland–San Jose
		5 23.3	4 23.8		7 21.8	**10** 19.8													Boston
10 20.3		**7** 21.5							9 21.6										Washington, D.C.
			6 25.6		3 26.9		8 23.5	**9** 22.8											Detroit
	5 22.1			**8** 21.3		**10** 20.2			3 23.9										Dallas–Fort Worth
	5 26.6			**6** 26.3		**9** 23.8			3 28.4	**10** 22.5									Houston
	7 21.6										8 20.6	**10** 20.2							Atlanta
5 23.9		**2** 26.1					7 21.9					**9** 20.3							Tampa–St. Petersburg
	8 21.4		7 21.8	**9** 20.8		**3** 24.0							6 21.9						Minneapolis–St. Paul
	4 23.6		9 20.9	**7** 22.3		**4** 23.6													Seattle–Tacoma
6 17.1	9 16.8		5 17.3	**6** 17.1								**10** 16.4							Miami–Ft. Lauderdale
3 26.7			7 25.5		8 25.0														St. Louis
	7 21.1		9 20.4		8 20.8			**10** 20.0	1 21.1					**4** 22.2					Denver
	5 21.6	**10** 19.7		**9** 20.5		**7** 20.9			3 26.5										Phoenix
		8 21.6			7 22.2			**3** 23.8											Sacramento–Stockton–Modesto
	9 20.4	**2** 25.5		**6** 20.6											4 21.3	**5** 20.9	8 20.5		Hartford–New Haven
10 18.5	6 20.6			**10** 18.5	8 19.8	**9** 18.7													Indianapolis
		5 23.2	8 22.4		7 22.8	**9** 21.4								**10** 20.5					Milwaukee
					6 23.9	**9** 21.0			7 22.2										Cincinnati

Nielsen Media Research

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NIELSEN STATION INDEX

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